

VacTrAK Basic Reminder/Recall Guide

Reminder/Recall allows you to notify patients due or past due for vaccinations. It is an effective, evidence based strategy to improve and sustain vaccination coverage rates in target populations when performed on a regular basis. **Organization (IRMS) Client or Facility Client** user types have access to the Reminder/Recall menu/options. Contact VacTrAK support for assistance.

Step 1: Select **Reminder/Recall** from the menu. Select options for target population. Specify age group and age appropriate vaccine series.

Ownership – Select *all patients you own* if your practice is considered a medical home. An organization takes “ownership” of a patient when they add demographic or vaccine information to a record in VacTrAK.

Service – Select all patients you serve for all patients you have *seen at your facility* or if your organization is a non-owning entity (i.e. pharmacy, school, public health, vital statistics).

Due Date Timeframe – select patients due now, due in the past or due in the future.

Select a series – Select age appropriate vaccine series from the drop down list, once selected the vaccines and number of doses is displayed, or create a custom series.

Schedule – allows the user to schedule Reminder/Recall generation at a specified date/time. This option works best for large practices or age cohorts of larger than 1000 patients.

Generate Patient List output will provide patient name, age, vaccines due, available contact methods, R/R attempts and Reason for Inactivation.

Logged in: PAUL GUZMAN Date: Apr 11, 2016

Reports Use Templates See Patient Groups

Reminder/Recall

1 2 3

How do you want to run this Reminder/Recall?

☒ For all patients you own
☐ For all patients you have seen at your facility
☐ Include Inactive Patients (Excluding deceased)
 Due Date Timeframe: Due Now

Who do you want to Contact?

Patient Location: Organization (IRMS) Facility
Organization (IRMS) Group
☒ Patient Age Range 19 Months 35 Months
☐ Patient Birth Date From Through
 Patient Gender Limit To...
 Exclude patients who were sent a notification in the last:
 # of ☒ Days ☐ Weeks ☐ Months ☐ Years

Advanced

Which vaccines would you like to include?

CHILD SERIES x ?

Vaccine Family	CHILD SERIES Number of doses in this series
DTaP/DT/Td	4
HIB	3
POLIO	3
HEP-B 3 DOSE	3
MMR	1
VARICELLA	1
PNEUMO (PCV)	4

☒ I only want to see my patients who are:
☒ Due for all selected vaccines
☐ One dose away
☐ One visit to complete the series

Click [here](#) to go to previous results from run on Apr 11, 2016 11:52:16 AM.

Clear Schedule Generate Patient List

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Step 2: Review list of patients and remove any that you do not want to contact by un-checking box before patient name.

Filter List – by contact type or prior notification

Check box - remove patients from recall group by un-checking

Hover – hover over patient record to display patient details

Icons – available contact methods (address, phone, cell, email)

Reason for Inactivation – patients that are no longer active with practice can be set to inactive so they no longer show on reports and reminder recall as owned by your organization

Submit – Submit edited list of patients for next step

Export the Patient List – open patient list in a .csv file for review; each vaccine for which a patient is due will show on a separate line for easy filter and sort

Step 3: What do you want to do with your selected recall group?

Choose method by clicking on the appropriate icon, follow the pop-up instructions/prompts.

- Generate a Patient List
- Print Letters
- Generate Auto-dialer Content
- Generate Mail Merge
- Create Custom Post Cards
- Print Mailing Labels
- Save as a Patient Group (Cohort) to track success rate
- Send email